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To Move Swiftly and to Strike Vigorously  
The Operational Art and Jackson's Valley Campaign of 1862

by  
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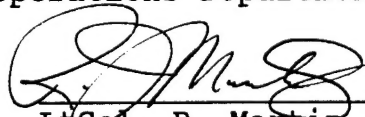
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## To Move Swiftly and to Strike Vigorously

### The Operational Art and Jackson's Valley Campaign of 1862

#### INTRODUCTION

"To move swiftly, strike vigorously and secure all the fruits of the victory is the secret of successful war"<sup>1</sup>, characterizes not only Thomas J. Jackson's approach to tactics and campaigning; but also his understanding of how his actions at the operational level of war can best contribute to the overall national strategic goal. He would act boldly in harmony with the intent of the higher level commander. During the spring of 1862, his skillful use of the operational art allowed his tiny army, operating against superior numbers in the Shenandoah Valley, to play an instrumental role in the strategic defense of Virginia and to disrupt Federal strategic designs far beyond his district.

This campaign was not really about the battles and actions in the Shenandoah Valley; but about the strategic defense of Virginia during General George B. McClellan's 1862 invasion and attempt to capture Richmond. The role that the Valley Campaign had in serving that larger strategic end actually defined the campaign itself. This is as it should be. The operational level of war serves the strategic level. This can occur when operational level commanders have the vision of their role in the grand strategic design. Jackson clearly had that vision.

Through the consistent application of secrecy and deception, the intelligent use of the theater's geography and speed of movement, Thomas Jackson, using a small force of about 18,000 at its largest, was able to successfully confound 70,000 Federal forces from three Federal military departments. "Between April 30 and June 9...He had marched his men some 400 miles, fought five battles on terms of his own choosing and defeated four different Union commanders. He had seized great quantities of stores urgently needed by the Confederacy. He had sent the Federal administration into consternation. He had changed the complexion of the entire Federal plan of campaign and had taught the military world a lesson in lightning war which would never be forgotten."<sup>2</sup> He conducted his campaign at the operational level of war in such a way that it contributed to creating strategic conditions for the defeat of the main strategic threat against Richmond, McClellan's Army of the Potomac.

Within the scope of this paper it is not possible or necessary to detail the campaign throughout its various stages, so I will draw on only certain examples of the operational art. After setting the stage with the overall strategic situation, I will try to minimize the chronology and details of the tactical movements and engagements in the campaign and address them only as required in considering this campaign in light of the four fundamental questions posed in the Joint Military Operations Course:

- What operational level goals or conditions must be

achieved in order to meet the nation's operational objectives?

- What sequence of actions must be planned and executed in order to reach those operational goals?

- How should the force's assets be applied to accomplish the sequence?

- What are the likely derivative costs and risks?

### **STRATEGIC SITUATION**

After the initial exuberance following the victories at Fort Sumter and First Manassas, the Confederate States of America confronted a seriously worsening situation in the spring of 1862. Reversals in the West had resulted in the loss of Kentucky, Missouri, most of Tennessee, much of Arkansas as well as northern Alabama and Mississippi. This dismal situation was compounded with the fall of the key river cities of New Orleans and Memphis.

The diplomatic front was also discouraging. Throughout Europe, the reaction to Federal victories in the West was diminished enthusiasm for recognition of Confederate independence. The assumed power of "King Cotton" over British policy, a view widely held in the South before the war, was revealed to have been a miscalculation.

In Virginia, more than 200,000 Federals were prepared to invade the Old Dominion. McClellan planned on placing 150,000 men in the campaign on Richmond. Additionally, Fremont had 30,000 in West Virginia, some of whom were moving east toward Staunton, and Banks had crossed the Potomac into the Shenandoah

Valley with 30,000. Less than 60,000 Confederate soldiers were available to oppose this enormous array. Northern material resources further contributed to the imbalance.<sup>3</sup>

In North Carolina, Federal forces, exploiting their naval advantage through amphibious assault, had landed an army under Major General Burnside seizing the former colonial capital of New Bern and threatening Richmond's only direct rail link to the Confederate States along the south Atlantic coast as well as possibly opening a new line on Richmond from the south.

The Confederate government, reeling from its military disasters in the west, desperately tried to cover an expansive frontier and coastline with scant resources. Only a limited number would be available for employment in Virginia and they would have to do. Confederate forces defending Virginia were spread along an arc whose chord extended from Staunton in the Northwest through Richmond to Norfolk in the Southeast. McClellan's main body could slide anywhere along that arc then bull straight through to Richmond enjoying local superiority of from three to one to ten to one depending on where it struck.<sup>4</sup> The Confederates had interior lines, but due to the overwhelming disadvantage in force ratios, would find it very difficult to take advantage of them.

Terrain and geography are not neutral<sup>5</sup> and this applies at the strategic level of war as it does at the lower levels. Dispositions in the strategic theater revealed the Confederates holding the central position around Richmond with certain

geographical advantages. In the west, the Shenandoah Valley led northeast toward the Federal capital of Washington, D.C., a natural invasion route,<sup>6</sup> and southwest away from the Confederate capital of Richmond. The central region of Virginia, McClellan's most direct invasion route, was crossed with numerous large rivers generally running from northwest to southeast thereby creating obstacles for an attacker from the north and natural, successive lines of defense for the defenders. On the other hand, the east was dominated by the Chesapeake Bay and the Atlantic Ocean which favored the substantial naval power of the Federal forces, presenting a myriad of opportunities for amphibious strikes.

In the latter arena, General McClellan decided to undertake his final knockout punch to destroy the Southern Revolution by moving 150,000 men in an amphibious turning movement around Johnston's army in Northern Virginia, landing at Fort Monroe on the Peninsula and taking Richmond from the southeast. Although criticized by many historians, it was a sound plan and the plan itself was not responsible for its failure. Confederate audacity and skillful employment of the operational art in support of national strategic policy, on the Peninsula as well as in the Valley, disrupted McClellan's plan and so confounded its execution that Jackson's campaign in the Shenandoah Valley is now considered a classic in the art of war.

## STRATEGIC OBJECTIVES AND GOALS

The Confederate strategic center of gravity was its army. As long as a significant rebel army remained in the field defying Federal authority in the states, popular support remained with the war for independence. Even after the fall of Richmond in 1865 and the moving of the government to Danville and later to North Carolina, the people supported the war effort until the main armies had surrendered.

The Federal strategic objective in 1862; however, was to seize Richmond. While many military thinkers consider this to have been a mismatch, it did have some strong points. As the Confederate capital was a key strategic communications center and the seat of the national government, it was a symbol of the legitimacy of Southern Confederacy. Politically and economically, it was something that the South could not afford to lose and would fight for. Threatening it would certainly bring the Confederate army to the field where it could be destroyed. Therefore, it was a sound strategic objective.

The Federal strategic center of gravity was its president, Abraham Lincoln. In addition to his desire to seize Richmond he was concerned with the protection of Washington. " . . . the real head of the Federal army was the President, and his strategical conceptions were necessarily subservient to the attitude of the Northern people."<sup>7</sup> "Lincoln's ambassadors had doubtless cautioned him that Europeans might equate surrender of the national capital with the collapse of the Union; if

Washington fell, foreign recognition of the Confederacy was a likely result. The loss of Washington would also shatter morale on the home front."<sup>8</sup> So Lincoln's interest in taking Richmond was understandably tempered with his political concerns for the defense of Washington.

In order to defend Richmond, Lee developed a strategy of offensive action directed against the northern strategic center of gravity in which Jackson's campaign would play a pivotal role. "It was not McClellan and McDowell whom Lee was fighting, not the enormous hosts which they commanded, nor the vast resources of the North. The power which gave life and motion to the mighty mechanism of the (northern) attack lay not within the camps...but far to the north in Washington...the power that controlled (the armies) was the Northern President. It was at Lincoln that Lee was about to strike, at Lincoln and the Northern people, and an effective blow at the point which people and President deemed vital might arrest the progress of their armies as surely as if the Confederates had been reinforced by a hundred thousand men."<sup>9</sup> Executing this strategy would require coordination between widely separated operational theaters within the overall strategic theater.

While General Johnston was in command of all Confederate forces in Virginia, by mid-spring 1862, he was preoccupied with his immediate task of opposing McClellan on the peninsula and had communicated little with his dispersed forces including Jackson in the Valley or Ewell at Gordonsville. General Robert E. Lee,

as the assistant to the Commander in Chief Jefferson Davis, "with great skill and little actual authority, moved to fill this vacuum... he advanced a strategy to guide Southern operations. (With McClellan on the peninsula threatening Richmond from the southeast and McDowell near Fredericksburg less than 60 miles north of Richmond, offering the potential for two fronts against Richmond, and Banks' army in the Valley) The threat from Fredericksburg had to be eliminated. Lee suggested that Jackson, with the assistance of Ewell's division, might be able to reduce the pressure from Fredericksburg by routing Banks. Lee reasoned, no doubt, that Banks's defeat would expose the strategic flank of Federal forces near Fredericksburg, thereby discouraging a Union attempt (toward Richmond) from that direction".<sup>10</sup>

#### **OPERATIONAL LEVEL GOALS AND CONDITIONS NEEDED**

Mission. Prior to the discovery of McClellan's move to the Peninsula, General Johnston expected the Federals to advance toward Richmond using the central overland route. Jackson's orders were for the Valley Army to fall back on line with the main army, protect its flank, secure the Blue Ridge passes and slow or stop enemy progress up the Shenandoah. Johnston's strategy was to retreat to preserve the main army. The Valley army would be only a sideshow in that retreat.<sup>11</sup> On April 21st, with Johnston now on the Peninsula opposing McClellan, Jackson received a letter from Lee suggesting an attack on Banks or perhaps directly at Fredericksburg thereby reducing the pressure

on Richmond from the north. Lee's intent to strike a blow was clear, but he did not over direct by specifying where it must be made, but instead focused on the effect it should have. On the 25th he wrote "The blow, wherever struck, must, to be successful, be sudden and heavy. The troops must be efficient and light. I cannot pretend at this distance to direct operations depending on circumstances unknown to me, and requiring the exercise of discretion and judgment as to time and execution..."<sup>12</sup>

This truly is the operational art practiced by a master. The mission itself is stated in terms of the conditions required: strike a blow in order to reduce the pressure on Richmond from the north. In modern times we refer to this as mission orders. The central element of the mission is really the commander's intent. Jackson now clearly understood what he was to do and he had the freedom to take advantage of the developing situation while doing it. Now it required boldness.

Characteristics of the area. From Staunton to Winchester, eighty miles, the Valley Turnpike led northeast, with the Alleghenies on the west and the Blue Ridge on the east. Whoever controlled this macadamized pike could move the fastest especially in rainy weather. East of the pike, from Harrisonburg to Strasburg, lay Massanutton Mountain, a forty mile long ridge and an alternate road lay in the valley beyond it. The twin forks of the Shenandoah River run north along the ridge, combining at Front Royal. The ridge could be crossed at only one point about midway along its length. The road net enclosing

Massanutton resembled an elongated capitalized H, and Jackson recognized that the crossbar was the key.<sup>13</sup> He repeatedly took advantage of possessing that crossbar.

Another important aspect of the area was that it was an important agricultural area and the South needed its produce. The population was very loyal to the Confederate fight for independence and could be depended on to provide reliable intelligence to their own army and denying it to the invaders.

Relative Combat Power. Jackson had about 8,000 and Ewell had 8,500. Additionally to the west, were 2800 under Edward Johnson. Each of these were separate "armies" yet Jackson's orders gave him the latitude to operate in concert with them tactically to accomplish larger operational level goals.

Opposing Jackson were two separate Federal armies: Fremont approaching from West Virginia with 30,000, the advance of which was now west of Staunton under Milroy with 3,500. Banks had another 30,000 coming up the Valley from the north, with its advance of 21,000 under Banks himself at Harrisonburg.

These force ratios which would indicate that the Confederates should defend, instead led Jackson to use skill and maneuver in order to attack separated forces in advance of the main bodies and thereby accomplish his objective. No easy task. He would await a favorable occasion to strike Banks. "My object, he wrote, has been to get in his rear...if he gives me an opportunity...it appears to me that if I remain quiet a few more days he will probably send a large force towards Harrisonburg and

thus enable me to attack his advance."<sup>14</sup> Here we see him using operational inaction to create conditions where the enemy will allow him to attack with more favorable force ratios. Although the enemy will be acting, Jackson has the initiative.

#### SEQUENCE OF ACTION REQUIRED

Jackson recognized that Banks was his principle opponent and understood his orders. He intended to strike Banks and proposed three courses of action outlining three branches that his campaign could follow. He proposed a course of action; however, that clearly recognized the need not to become so preoccupied with Banks (his operational level objective) that he lost the importance of his campaign in the larger strategic picture, the defense of Richmond. "Of the three plans I give the preference to attacking the force east of Staunton (Milroy), for, if successful, I would afterward only have Banks to contend with, and in doing this would be reinforced by General Edward Johnson, and by that time you (Lee) might be able to send me reinforcements, which united with the troops under my control, would enable me to defeat Banks. If he should be routed and his command destroyed, nearly all our own forces here could, if necessary, cross the Blue Ridge to Warrenton, Fredericksburg, or any other threatened point."<sup>15</sup>

In practicing the operational art, Jackson shows his grasp of the phasing that his campaign should follow and even anticipates sequels. Throughout this sequence of action that he

proposed, he provided for his force to retain the initiative. He would use deception to lure the enemy into doing his will so that he could meet the enemy under conditions of his own choosing that would place him at an advantage and prevent his opponent from exploiting the advantage of his superior numbers in the theater.

#### **APPLICATION OF RESOURCES**

In order to accomplish his plan, Jackson would have to use not only economy of force but also deception. "Although Jackson was attacking Milroy in the Alleghenies, Banks' force at Harrisonburg still posed a potential threat to Jackson's flank and rear. Ashby's command (Jackson's cavalry) was left behind to watch Banks and provide warning of any southward movement by the Federals while Gen. Ewell's force, which had occupied Jackson's former position in the Valley, was to watch Banks from the east. Spies were dispatched to provide Ewell with information regarding any federal movements and various local inhabitants furnished details about the local area. The Confederate march across the Blue Ridge was a masterful deception designed to capitalize on the masking characteristics of the terrain and to confuse the Federals as to Jackson's whereabouts."<sup>16</sup>

#### **COSTS AND RISKS**

In looking at this initial phase of the campaign it is clear that Jackson's proposal was very risky. In moving on Staunton Jackson had three objects in view:

- To strengthen his own force by combining with Johnson.
- To keep the Federals from combining by keeping Banks stationary and defeating Milroy.
- To protect Staunton.

"The real danger that he had to guard against was that Banks, taking advantage of his absence from the Valley, should move on Staunton...when he found out that Jackson had vanished from the Valley, Banks might take heart and join hands with Milroy. It was necessary; therefore, in order to prevent Banks moving, that Jackson's absence from the Valley should be very short; also, in order to prevent Milroy either joining Banks or taking Staunton, that Edward Johnson should be reinforced as rapidly as possible."<sup>17</sup>

By far the greatest risk for Jackson throughout the campaign was that the overwhelming forces in his theater might combine and trap him into a battle which he could not win. He realized that his security was improved by moving rapidly and constantly and striking unexpectedly. This forced his opponents to be more defensive as they were never sure where Jackson was and where they should concentrate. This made it difficult for them to keep constant pressure on his main force depriving him of the time and space for counterstrokes. He reduced his risk by making it so difficult for his opponents to pursue the basic strategy that exterior lines demanded for success.

Jackson was employing essentially the same strategy at the operational level of war that Lee was using at the strategic

level. Use interior lines to advantage. Be willing to accept calculated risks through economy of force operations in order to concentrate against exposed elements of different wings of the attackers. Move and deceive the enemy as to your position and intentions so that it confounds his strategy and yields the initiative to you.

### CONCLUSION

Following his success in the initial phase of the campaign at Milroy, Jackson received additional orders from Lee. Again the form was that of a mission order, outlining Lee's intent rather than dictating specific objectives. Lee wrote: "Whatever movement you make against Banks, do it speedily, and if successful drive him back towards the Potomac, and create the impression, as far as possible, that you design threatening that line."<sup>18</sup> Jackson was able to go on to defeat Banks and push north almost to the Potomac River. Convinced that he was threatening that line, Lincoln diverted troops promised to McClellan for the main attack on Richmond, and strengthened the defense of Washington. He also committed more resources to trying to find and defeat Jackson in the Valley. The result was relief of some of the pressure on Richmond, Lee's strategic intent.

Jackson attributed his success to Providence. Writing to his wife he stated "God has been our shield, and to His name be all the glory,". In securing the fruits which the Lord's favor

made available, Jackson told one of his officers, "Always mystify, mislead, and surprise the enemy, if possible. And when you strike and overcome him never let up in pursuit...The other rule is never fight against heavy odds if by any possible maneuvering you can hurl your own force on only a part, and that the weakest part, of your enemy and crush it. Such tactics will win every time, and a small army may thus destroy a large one in detail, and repeated victory will make it invincible."<sup>19</sup>

Lee and Jackson truly understood the operational art. "Without quitting his desk, and leaving the execution of his plans to Jackson, Lee had relieved Richmond of the pressure of 70,000 Federals and lured the remainder into the position he most wished to find them."<sup>20</sup> While the triumphs of the Valley campaign are no doubt due, in part, to the courage and endurance of committed troops defending their country from invaders, the skill of Lee and Jackson in employing the principles of the operational art were decisive in this campaign. At a time of much discouragement in our country and its armies, this campaign, building on Jackson's "Stonewall defense" at first Manassas, contributed to the tradition of victory which built the esprit de corps and a feeling of invincibility which permeated the Army of Northern Virginia thereafter.

## ENDNOTES

1. Thomas J. Jackson, quoted in Robert Debs Heinl Jr., Dictionary of Military and Naval Quotations (Annapolis: US Naval Institute, 1966), 131.
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3. G.F.R. Henderson, Stonewall Jackson and the American Civil War, (New York: Longmans Green and Company), 404.
4. Shelby Foote, The Civil War: A Narrative, (New York: Random House 1958), 396.
5. FM 100-5, p 14-4
6. Dupuy and Dupuy, p 119
7. Henderson, p 252
8. Robert G. Tanner, Stonewall in the Valley: Thomas J. Jackson's Shenandoah Valley Campaign, Spring 1862, (New York: Doubleday and Company, 1976), 101.
9. Henderson, p 306
10. Tanner, p 156
11. Tanner, p 103
12. Henderson, p 282
13. Foote, p 425
14. Henderson, p 281
15. Henderson, p 284
16. Smith, Shawn B., Foundation for Victory: Operations and Intelligence Harmoniously Combine in Jackson's Shenandoah Valley Campaign (1862), (Monterey, CA.: Naval Postgraduate School 1993), 301.
17. Henderson, p 291
18. Henderson, p 306
19. Foote, p 464
20. Henderson, p 408

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